



HRBEN BENEFITS ADMINISTRATION

Chapter 6 Adjustment Reasons



Additional Adjustment Reason - Overview

Adjustment Code	Adjustment Reason
DDEP	Deceased Dependent
DIV	Divorce
INED	Ineligible Dependent
CANC	Cancellation
FSC	Family Status Change
HIP	HIPAA
TTFT	Transfer to Full Time
RERE	Rehire
MISC	Miscellaneous
HIRE	New Hire Enrollment
JOB	Transfer (RTR Plan)
JOB1	Transfer (All Plans)
LF1E	Return From LWOP
REDH	Reduction in Hours

Five Adjustment Reasons have been created to better identify changes that qualify for COBRA extension. Process augments Family Status change procedures for Agency Benefits representatives. Proper use of these adjustment reasons will insure that accurate information is sent to EBD for use in processing COBRA events, and transmitting information to the Health vendors.

DDEP – *Deceased Dependent*. Use first day of the month after the death of the dependent. Nightly batch will recalculate to correct pay period for beginning of new deductions.

DIV – *Divorce*. Use first day of the month after the event. Nightly batch will recalculate to correct pay period.

INED – *Ineligible Dependent*. Use first day of the month after the event. Nightly batch will recalculate to correct pay period. (ex. Non-student dependent over the age of 19, married dependent)

CANC – *Cancellation*. For employee cancellation. Also, use for cancellation of a dependent on a post-tax Plan or an employee canceling a dependent during open-enrollment. Use last day of employee's coverage (end of month). Nightly batch will recalculate to correct pay period.

REDH – *Reduction in Hours*. Employee's work hours reduced and employee is no longer eligible for benefits..



Demonstration

Adjustment Reason: (Ineligible or Deceased Dependent)

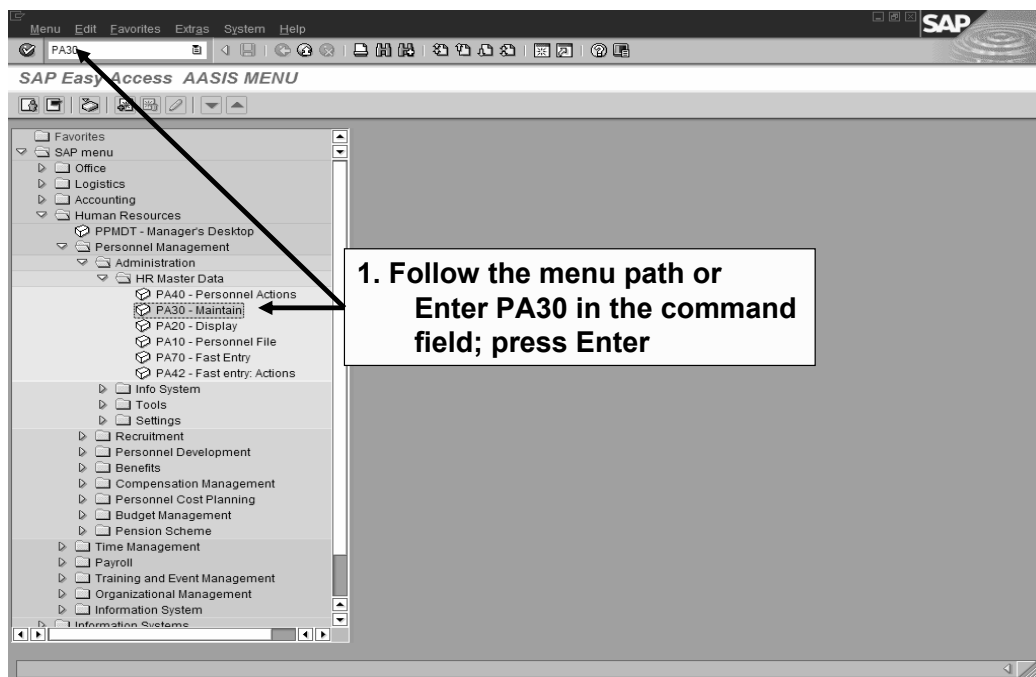
Human Resources > Personnel Management >
Administration > HR Master Data > Maintain
(PA30/HRBEN0001)





Adjustment Reason

Ineligible or Deceased Dependent



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Menu Path: Human Resources>Personnel Management>HR Master Data>PA30(Maintain)

PA30 (Maintain Master Data) should be used by the Benefits Specialist to Create the Adjustment Reason.



Adjustment Reason Ineligible or Deceased Dependent

The screenshot shows the SAP HR Master Data Maintenance interface. At the top, the menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar reads 'Maintain HR Master Data'. Below this, a data entry section contains fields for 'Personnel no.' (43356), 'Name' (Adjustment Reason), 'EE group' (1 Regular State), 'Pers. area' (Justice Building - 1st Fl...), 'EE subgroup' (UE Employee), 'Cost Center' (118001), and 'Supreme Court'. A callout box labeled '2. Enter the personnel number' points to the 'Personnel no.' field. Below the data entry section are tabs for 'Employment Issues', 'Career Management', 'Benefits', 'Payroll', and 'Taxes'. The 'Benefits' tab is selected. On the left, a list of infotypes is shown with checkboxes: 'General Benefits Information' (checked), 'Family Member/Dependents' (checked), 'Adjustment Reasons' (checked), 'Health Plans', 'Insurance Plans', 'Savings Plans', 'Flexible Spending Accounts', 'Benefits Medical Information', and 'COBRA-Qualified Beneficiary'. A callout box labeled '3. Use the left and right scroll buttons to select the Benefits tab' points to the 'Benefits' tab. The main area of the screen shows a 'Period' selection section with radio buttons for 'Today', 'A11', 'From curr. date', 'To current date', 'Curr. period', 'Curr. week', 'Current month', 'Last week', and 'Current Year'. Below this is a 'Direct selection' section with 'Infotype' and 'STy' fields.



Adjustment Reason Ineligible or Deceased Dependent

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 43356

Person: [Name] Pers.area: ZE01 Justice Building, 1st Fl... Cost Center: 118001 Supreme Court

Employment Issues Career Management Benefits Payroll Taxes

Infotype text [E] Period
General Benefits Information [x]
Family Member/Dependents [x]
Adjustment Reasons [x]
Health Plans [x]
Insurance Plans [x]
Savings Plans [x]
Flexible Spending Accounts [x]
Benefits Medical Information [x]
COBRA-Qualified Beneficiary [x]

Period
Fr. To
Today Curr.week
A11 Current month
From curr.date Last week
To current date Last month
Curr.period Current Year
Choose

Direct selection
Infotype 0378 STy

5. Click Create

4. Select the Adjustment Reasons Infotype, or enter 0378 in the Infotype field



Adjustment Reason Ineligible or Deceased Dependent

↑ create Adjustment Reasons

8. Click Enter

EE group: 1 Regular State Em... Personnel ar: ZE01 *Justice Building, 1st Floor N
EE subgroup: UE Employee
Start: 01/01/2005

6. Enter the date*

Adjustment Reason Data
Benefit area: State of Arkansas-US
Adjustment reason:

7. Select the Adjustment reason that applies

- Cancellation
- Deceased Dependent
- Divorce
- Family Status Change
- HIPAA
- New Hire Enrollment
- Ineligible Dependent
- Transfer(Rtr. Plans)
- Transfer (All Plans)
- Return from LWOP

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- *The date will be the first day of the month after the event occurred.



Adjustment Reason Ineligible or Deceased Dependent

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 43356 Name Adjustm... Status Active

EE group 1 Regular State Em... Personnel ar ZE01 Justice Building, 1st Floor N

EE subgroup UE Employee SSN 778-99-7878

Start 01/01/2005 to 12/31/9999

Adjustment Reason Data

Benefit area State of Arkansas-US

Deviation from end date

Current end date: 12/31/9999

Calculated end date: 01/31/2005

Do you want to replace the current end date with the calculated end date?

Yes No Cancel

9. Click Yes



Adjustment Reason Ineligible or Deceased Dependent

The screenshot shows the SAP 'Create Adjustment Reason' interface. A white callout box with the text '10. Click to Save' and an arrow points to the 'Save' icon in the top toolbar. The main form contains the following data:

Personnel No	433	Adjustm...	Status	Active
EE group	1 Reg	ZE01	Justice Building, 1st Floor N	
EE subgroup	UE Emp	778-99-7878		
Start	01/01/2005	to	01/31/2005	

Below the data fields, the 'Adjustment Reason Data' section shows:

- Benefit area: State of Arkansas-US
- Adjustment reason: Information

An 'Information' dialog box is open in the foreground with the title 'Save your entries'. It contains an information icon (i) and two buttons: 'OK' (with a checkmark icon) and 'Help'.

At the bottom left of the SAP window, there is a status bar with a checkmark icon and the text 'Save your entries'.



Adjustment Reason Ineligible or Deceased Dependent

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 43356 Name Adjustm... Status Active

EE group 1 Regular State Em... Personnel ar ZE01 *Justice Building, 1st Floor N

EE subgroup UE Employee SSN 778-99-7878

Start 01/01/2005 to 01/31/2005

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason Ineligible Dependent

Go to enrollment

Do you want to go to enrollment?

Yes

No

Cancel

11. Click 'Yes' to continue to Enrollment/HRBEN0001



Adjustment Reason Ineligible or Deceased Dependent

Enrollment Edit Go System Help

Enrollment

Direct selection Selection set

Enroll Name Adjustment Reason on 01/01/2005 Overview

Personnel no. 43356

ID number

Select

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Ineligible Dependent	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999

Pers No. Name

43356	Adjustment
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12. Select the Ineligible Dependent offer



Adjustment Reason Ineligible or Deceased Dependent

Enrollment

Enroll Name Adjustment Reason on 01/01/2005 Overview

Offer selection Get offer Print form Error list

Possible offers Enrollment period

01/01/2005 - 01/31/2005
01/01/1800 - 12/31/9999

13. Select the employee's Medical Plan

Undo selection Error list

	Status	Validity period	Activity
Medical			
Health Advantage HMO		01/01/2005 - 12/31/9999	
QualChoice HMO		01/01/2005 - 12/31/9999	
Nova Sys HMO		01/01/2005 - 12/31/9999	
Health Advantage POS		01/01/2005 - 12/31/9999	
QualChoice POS		01/01/2005 - 12/31/9999	
NovaSys POS		01/01/2005 - 12/31/9999	
Blue Cross Blue Shield PPO		01/01/2005 - 12/31/9999	
NovaSys PPO		01/01/2005 - 12/31/9999	
High Deductible PPO		01/01/2005 - 12/31/9999	
Dependent Life			
US Able (Basic DEP Life ASE)		01/01/2005 - 12/31/9999	
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		01/01/2005 - 12/31/9999	



Adjustment Reason Ineligible or Deceased Dependent

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll Reason on 01/01/2005 Overview

Maintain Health Plan

Pers.No. 43356 Adjustment Reason

Plan Health Advantage HMO

Start 01/01/2005 - 12/31/999

14. Select the dependent tab

Stop participation in period

Option Dependents

Plan options

Health Plan Opt Standard HMO ASE1

Dependent Cover Emp + Family 1

Costs USD Monthly

Employee 381.48 Deductions Pre-

Employer 0.00

Accept

Dependent Life

US Able (Basic DEP Life ASE)

Opt. Dep. Life

US Able (Opt DEP Life ASE)

401(a)

Enrollment period

01/01/2005 - 01/31/2005

01/01/1800 - 12/31/9999

Undo selection

Status Validity period Activity

MO 01/01/2005 - 12/31/9999

OS 01/01/2005 - 12/31/9999

ield PPO 01/01/2005 - 12/31/9999

O 01/01/2005 - 12/31/9999

Life ASE) 01/01/2005 - 12/31/9999

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Adjustment Reason Ineligible or Deceased Dependent

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll Reason on 01/01/2005 Overview

Maintain Health Plan

Pers.No. 43356 Adjustment Reason

Plan Health Advantage HMO

Start 01/01/2005 - 12/31/9999

Stop participation in period

Option Dependents

Select Name Type of dep./ben.

<input checked="" type="checkbox"/>	Adjust Reason	Spouse
<input type="checkbox"/>	Ad Reason	Child
<input checked="" type="checkbox"/>	Just Reason	Child

15. Choose the ineligible dependent and uncheck the selection box

16. Select the 'Option' tab

Enrollment period

01/01/2005 - 01/31/2005
01/01/1800 - 12/31/9999

Undo selection

Status	Validity period	Activity
MO	01/01/2005 - 12/31/9999	
OS	01/01/2005 - 12/31/9999	
Field PPO	01/01/2005 - 12/31/9999	
O	01/01/2005 - 12/31/9999	
P Life ASE)	01/01/2005 - 12/31/9999	
Opt Dep. Life	01/01/2005 - 12/31/9999	
US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999	

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Adjustment Reason Ineligible or Deceased Dependent

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll Reason on 01/01/2005 Overview

Maintain Health Plan

Pers.No. 43356 Adjustment Reason

Plan Health Advantage HMO

Start 01/01/2005 - 12/31/9999

☐ Stop participation in period

Option Dependents

Plan options

Health Plan Opt Standard HMO ASE1

Dependent Cover Emp + Family 1
Emp + Child(ren) 1
Employee+Child(ren)
Employee+Family
Employee
Employer Employee plus Spouse
Employee Only 1
Emp + Family 1
Emp + Spouse 1

Costs USD Monthly

Employee

Employer

Accept

Note: Check 'Dependent Cover' section to make sure the employee's remaining dependents are covered; if applicable

MO	01/01/2005 - 12/31/9999
OS	01/01/2005 - 12/31/9999
ield PPO	01/01/2005 - 12/31/9999
O	01/01/2005 - 12/31/9999
Life ASE)	01/01/2005 - 12/31/9999
Dependent Life	
US Able (Basic DEP Life ASE)	01/01/2005 - 12/31/9999
Opt. Dep. Life	
US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999
401(a)	

17. Click to Accept



Adjustment Reason

Ineligible or Deceased Dependent

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name

43356 Adjustment Reason

Enroll Name Adjustment Reason on 01/01/2005 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Ineligible Dependent	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Ineligible Dependent

Enroll Costs Undo selection Error list

Medical	Status	Validity period	Activity
Health Advantage HMO	<input checked="" type="checkbox"/>	01/01/2005 - 12/31/9999	<input checked="" type="checkbox"/>
QualChoice HMO	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
Nova Sys HMO	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
Health Advantage POS	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
QualChoice POS	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
NovaSys POS	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
Blue Cross Blue Shield PPO	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
NovaSys PPO	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
High Deductible PPO	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
Dependent Life	<input type="checkbox"/>		<input type="checkbox"/>
US Able (Basic DEP Life ASE)	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>
Opt. Dep. Life	<input type="checkbox"/>		<input type="checkbox"/>
US Able (Opt DEP Life ASE)	<input type="checkbox"/>	01/01/2005 - 12/31/9999	<input type="checkbox"/>

18. Select Enroll to complete the Adjustment process

Adjustment Reason
Ineligible or Deceased Dependent

[illegible]



Adjustment Reason Ineligible or Deceased Dependent

The screenshot shows the SAP Enrollment interface. A message box in the foreground states "Enrollment completed successfully". Below the message are buttons for "Continue" and "Confirmation". In the background, a table lists insurance plans and their validity periods.

Plan	Validity period	Status
Health Advantage HMO	01/01/2005 - 12/31/9999	✓
QualChoice HMO	01/01/2005 - 12/31/9999	
va Sys HMO	01/01/2005 - 12/31/9999	
Health Advantage POS	01/01/2005 - 12/31/9999	
QualChoice POS	01/01/2005 - 12/31/9999	
vaSys POS	01/01/2005 - 12/31/9999	
Health Cross Blue Shield PPO	01/01/2005 - 12/31/9999	
vaSys PPO	01/01/2005 - 12/31/9999	
Health Deductible PPO	01/01/2005 - 12/31/9999	
Health Life		
Health (Basic DEP Life ASE)	01/01/2005 - 12/31/9999	
Health (Opt DEP Life ASE)	01/01/2005 - 12/31/9999	

20. Click to print
Confirmation letter;
once complete, click
to continue



Demonstration

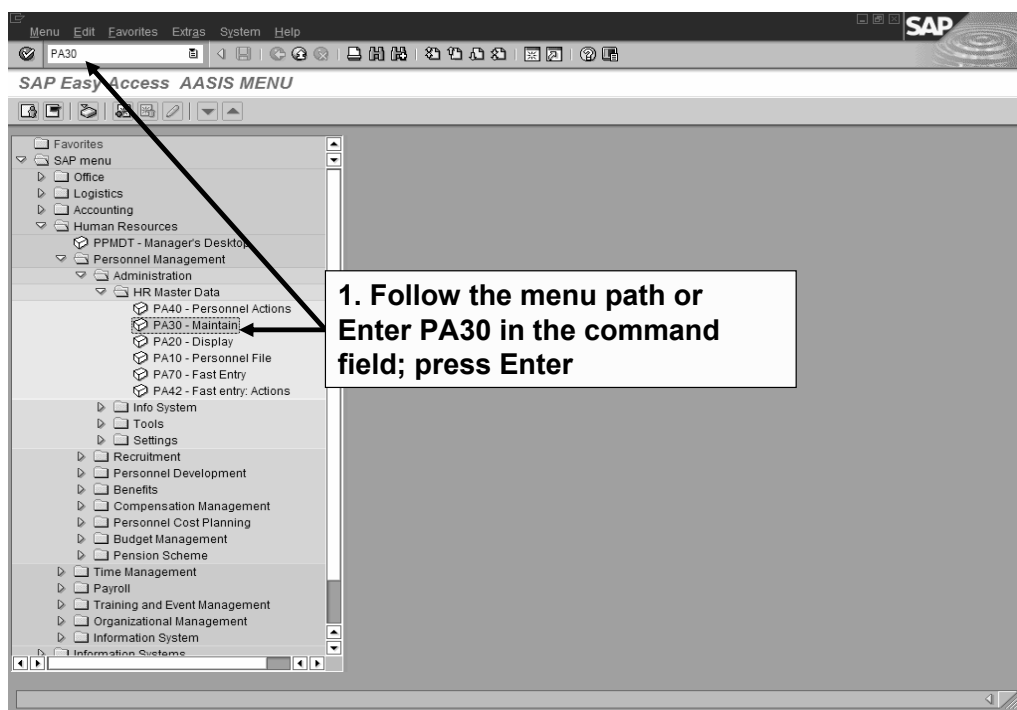
Adjustment Reason: (Divorce)

Human Resources > Personnel Management >
Administration > HR Master Data > Maintain
(PA30/HRBEN0001)





Adjustment Reason Divorce



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Menu Path: Human Resources>Personnel Management>HR Master Data>PA30(Maintain)

PA30 (Maintain Master Data) should be used by the Benefits Specialist to Create the Adjustment Reason.



Adjustment Reason Divorce

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 43356

Name Adjustment Reason

EE group 1 Regular State Pers.area ZE01 Justice Building, 1st Fl...

EE subgroup UE Employee Cost Center 118001 Supreme Court

Employment Issues Career Management **Benefits** Payroll Taxes

Infotype text E

General Benefits Information

Family Member/Dependents

Adjustment Reasons

Health Plans

Insurance Plans

Savings Plans

Flexible Spending Accounts

Benefits Medical Information

COBRA-Qualified Beneficiary

Period

Period

Fr. To

Today Curr. week

A11 Current month

From curr. date Last week

To current date Last month

Curr. period Current Year

Choose

Personal Data

Addtl. Emplo

Employment Issues

Career Management

Benefits

Payroll

Taxes

Garnishments

Time

Direct selection

Infotype STy



Adjustment Reason Divorce

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

5. Click Create

Name Adjustment Reason

EE group 1 Regular State Pers.area ZE01 Justice Building, 1st Fl...

EE subgroup UE Employee Cost Center 118001 Supreme Court

Employment Issues Career Management Benefits Payroll Taxes

Infotype text E

General Benefits Information ☒

Family Member/Dependents ☒

Adjustment Reasons ☒

Health Plans ☐

Insurance Plans ☐

Savings Plans ☐

Flexible Spending Accounts ☐

Benefits Medical Information ☐

COBRA-Qualified Beneficiary ☐

Period

Period

Fr. To

☐ Today ☐ Curr.week

☐ A11 ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Curr.period ☐ Current Year

Choose

Direct selection

Infotype 0378 STy

4. Select the Adjustment Reasons Infotype, or enter 0378 in the Infotype field



Adjustment Reason Divorce

Create Adjustment Reasons

8. Click Enter

6. Enter the date*

7. Select the Adjustment reason that applies

Personnel no: 33306 Name: Adjustm... Status: Active
EE group: 1 Regular State Em... Personnel ar: Z601 Justice Building, 1st Floor N
EE subgroup: UE Employee
Start: 01/01/2005

Adjustment Reason Data

Benefit area: State of Arkansas-US
Adjustment reason: Divorce

Family Status Change
HIPAA
New Hire Enrollment
Ineligible Dependent
Transfer(Rtr. Plans)
Transfer (All Plans)
Return from LWOP
Misc Benefit Changes
Promotion/Demotion

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*Date should be first of the month following the event.



Adjustment Reason Divorce

SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 43356 Name Adjustm... Status Active
EE group 1 Regular State Em... Personnel ar ZEB1 Justice Building, 1st Floor N
EE subgroup UE Employee SSN 778-99-7878
Start 01/01/2005 to 12/31/9999

Adjustment Reason Data
Benefit area State of Arkansas-US
Adjustment reason Divorce

Deviation from end date
Current end date: 12/31/9999
Calculated end date: 01/31/2005
Do you want to replace the current end date with the calculated end date?
Yes No Cancel

9. Click Yes



Adjustment Reason Divorce

SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

10. Click to Save

Personnel No	Name	Adjustment	Status	Active
45300	Regular State Em...	ZE01		

EE group 1 Regular State Em... Personnel ar ZE01 Justice Building, 1st Floor N

EE subgroup UE Employee SSN 776-99-7878

Start 01/01/2005 to 01/31/2005

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason Divorce

Information

Save your entries

OK Help

Save your entries



Adjustment Reason Divorce

The screenshot shows the SAP HRBEN0001 transaction. The main window displays the 'Adjustment Reason Data' section with the following information:

Personnel No	43356	Name	Adjustm...	Status	Active
EE group	1	Regular State Em...	Personnel ar	ZE01	*Justice Building, 1st Floor N
EE subgroup	UE	Employee	SSN	778-99-7878	
Start	01/01/2005	to	01/31/2005		

Below this, the 'Adjustment Reason Data' section shows:

Benefit area	State of Arkansas-US
Adjustment reason	Divorce

A confirmation dialog box titled 'Go to enrollment' is displayed in the foreground, asking 'Do you want to go to enrollment?'. It has three buttons: 'Yes', 'No', and 'Cancel'. An arrow points from the 'Yes' button to a text box that says '11. Click 'Yes' to continue to Enrollment/HRBEN0001'.



Adjustment Reason Divorce

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no. 43356

ID number

Select

Pers. No. Name

43356 Adjustment Reason

Enroll

Name Adjustment Reason on 01/01/2005 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Divorce	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

12. Select the 'Divorce' offer



Adjustment Reason Divorce

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Enroll Name Adjustment Reason on 01/01/2005 Overview

Personnel no. ID number

Select

Pers.No. Name

43356 Adjustment Reason

Offer selection

Get offer Print form Error list

Possible offers Enrollment period

	01/01/2005 - 01/31/2005
	01/01/1800 - 12/31/9999

13. Select the employee's Medical Plan

Enroll Costs Auto selection Status Validity period Activity

Medical

Health Advantage HMO	01/01/2005 - 12/31/9999
QualChoice HMO	01/01/2005 - 12/31/9999
Nova Sys HMO	01/01/2005 - 12/31/9999
Health Advantage POS	01/01/2005 - 12/31/9999
QualChoice POS	01/01/2005 - 12/31/9999
NovaSys POS	01/01/2005 - 12/31/9999
Blue Cross Blue Shield PPO	01/01/2005 - 12/31/9999
NovaSys PPO	01/01/2005 - 12/31/9999
High Deductible PPO	01/01/2005 - 12/31/9999

Dependent Life

US Able (Basic DEP Life ASE)	01/01/2005 - 12/31/9999
------------------------------	-------------------------

Opt. Dep. Life

US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999
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Adjustment Reason Divorce

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll

Maintain Health Plan

Pers.No. 43356 Adjustment Reason

Plan Health Advantage HMO

Start 01/01/2005 - 12/31/9999

Stop participation in period

Option Dependents

Plan options

Health Plan Opt Standard HMO ASE1

Dependent Cover Emp + Spouse 1

Costs USD Monthly

Employee 336.74 Deductions Pre-

Employer 0.00

Accept

Reason on 01/01/2005 Overview

Print form Error list

Enrollment period
01/01/2005 - 01/31/2005
01/01/1800 - 12/31/9999

Undo selection Error list

Status	Validity period	Activity
MO	01/01/2005 - 12/31/9999	
OS	01/01/2005 - 12/31/9999	
ield PPO	01/01/2005 - 12/31/9999	
O	01/01/2005 - 12/31/9999	
Life ASE)	01/01/2005 - 12/31/9999	
Dependent Life		
US Able (Basic DEP Life ASE)	01/01/2005 - 12/31/9999	
Opt. Dep. Life		
US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999	
461(a)		

14. Select the
dependent tab



Adjustment Reason Divorce

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll

Maintain Health Plan

Pers.No. 43356 Adjustment Reason

Plan Health Advantage

Start 01/01/2005 - 12/31/2005

Stop participation in period

Option Dependents

Select Name Type of dep./ben.

Adjust Reason Spouse

15. Choose the ineligible dependent and uncheck the selection box

16. Select the 'Option' tab

Reason on 01/01/2005 Overview

Print form Error list

Enrollment period

01/01/2005 - 01/31/2005

01/01/1800 - 12/31/9999

Undo selection Error list

Status	Validity period	Activity
MO	01/01/2005 - 12/31/9999	
OS	01/01/2005 - 12/31/9999	
ield PPO	01/01/2005 - 12/31/9999	
O	01/01/2005 - 12/31/9999	
Life ASE)	01/01/2005 - 12/31/9999	
Dependent Life		
US Able (Basic DEP Life ASE)	01/01/2005 - 12/31/9999	
Opt. Dep. Life		
US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999	
401(a)		

Accept

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Adjustment Reason Divorce

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll Reason on 01/01/2005 Overview

Maintain Health Plan

Pers.No. 43356 Adjustment Reason

Plan Health Advantage HMO

Start 01/01/2005 - 12/31/9999

☐ Stop participation in period

Option Dependents

Plan options

Health Plan Opt Standard HMO ASE1

Dependent Cover Employee Only 1

Costs USD Monthly

Employee 94.52

Employer 0.00

☒ Deductions Pre-

Accept

Note: Check 'Dependent Cover' section to make sure the employee's remaining dependents are covered; if applicable

Life ASE)	01/01/2005 - 12/31/9999
Dependent Life	
US Able (Basic DEP Life ASE)	01/01/2005 - 12/31/9999
Opt. Dep. Life	
US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999
401(a)	

17. Select Accept



Adjustment Reason Divorce

Enrollment

Enroll

Name Adjustment Reason on 01/01/2005 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Divorce	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Anytime changes

Enroll Costs Undo selection Error list

	Status	Validity period	Activity
Medical			
Health Advantage HMO		01/01/2005 - 12/31/9999	✓
QualChoice HMO		01/01/2005 - 12/31/9999	
Nova Sys HMO		01/01/2005 - 12/31/9999	
Health Advantage POS		01/01/2005 - 12/31/9999	
QualChoice POS		01/01/2005 - 12/31/9999	
NovaSys POS		01/01/2005 - 12/31/9999	
Blue Cross Blue Shield PPO		01/01/2005 - 12/31/9999	
NovaSys PPO		01/01/2005 - 12/31/9999	
High Deductible PPO		01/01/2005 - 12/31/9999	
Basic Life			
US Able (Basic EE Life ASE)		01/01/2005 - 12/31/9999	
Dependent Life			
US Able (Basic DEP Life ASE)		01/01/2005 - 12/31/9999	
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		01/01/2005 - 12/31/9999	
401(a)			

18. Select Enroll to complete the Adjustment process



Adjustment Reason Divorce

Enrollment Edit Goto System Help

Enroll Name Adjustment Reason on 01/01/2005 Overview

Personnel no. ID number

Confirmation of Selected Actions

Activity	Plan	From	To
Change	Health Advantage HMO	01/01/2005	12/31/9999

Note: Verify that the activity change is correct

Enroll Cancel

19. Click to enroll

US Able (Basic DEP Life ASE)
Opt. Dep. Life
US Able (Opt DEP Life ASE)
401(a)

Error list

Validity period Activity

01/01/2005 - 12/31/9999 ✓
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999
01/01/2005 - 12/31/9999

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Adjustment Reason Divorce

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Enroll Name Adjustment Reason on 01/01/2005 Overview

Personnel no.

ID Enrollment

Enrollment completed successfully

Continue Confirmation

20. Click to print Confirmation letter; once completed, click Continue

Enrollment period
01/01/2005 - 01/31/2005
01/01/1800 - 12/31/9999

Status	Validity period	Activity
	01/01/2005 - 12/31/9999	✓
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	



Demonstration

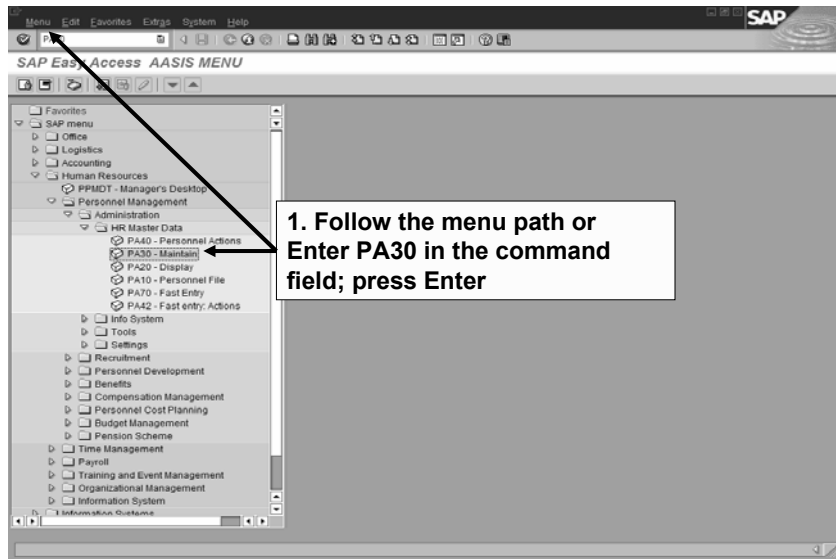
- **Adjustment Reason:**
(Cancellation)

Human Resources > Personnel Management >
Administration > HR Master Data > Maintain
(PA30)





Adjustment Reason Cancellation



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Menu Path: Human Resources>Personnel Management>HR Master Data>PA30(Maintain)

PA30 (Maintain Master Data) should be used by the Benefits Specialist to Create the Adjustment Reason.



Adjustment Reason Cancellation

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 43356

Name Adjustment Reason

EE group 1 Regular State

EE subgroup UE Employee Cost Center 118001 Supreme Court

Employment Issues Career Management Benefits Payroll Taxes

Infotype text

General Benefits Information

Family Member/Dependents

Adjustment Reasons

Health Plans

Insurance Plans

Savings Plans

Flexible Spending Accounts

Benefits Medical Information

COBRA-Qualified Beneficiary

Period

Fr. To

Today Curr. week

A11 Current month

From curr. date Last week

To current date Last month

Curr. period Current Year

Choose

Direct selection

Infotype STy

Personal Data

Addtl. Employment

Career Management

Benefits

Payroll

Taxes

Garnishments

Time

2. Enter the personnel number

3. Use the left and right scroll buttons to select the Benefits tab



Adjustment Reason Cancellation

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel File 42256

Reason ZE01 Justice Building, 1st Fl...

EE subgroup UE Employee Cost Center 118001 Supreme Court

Employment Issues Career Management Benefits Payroll Taxes

Infotype text E

General Benefits Information ☒

Family Member/Dependents ☒

Adjustment Reasons ☒

Health Plans ☐

Insurance Plans ☐

Savings Plans ☐

Flexible Spending Accounts ☐

Benefits Medical Information ☐

COBRA-Qualified Beneficiary ☐

Period

Period

Fr. To

☐ Today ☐ Curr. week

☐ A11 ☐ Current month

☐ From curr. date ☐ Last week

☐ To current date ☐ Last month

☐ Curr. period ☐ Current Year

Choose

Direct selection

Infotype 0378 STy

5. Click Create

4. Select the Adjustment Reasons
Infotype, or enter 0378 in the Infotype
field



Adjustment Reason Cancellation

The screenshot shows the SAP 'Create Adjustment Reasons' transaction. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. The main window displays a table with columns: Name, Adjustm..., Status, and Active. The table contains one row with the following data: EE group: EE subgroup, UE Employee, Start: 01/01/2005, Personnel ar: ZE01, and Justice Building, 1st Floor N. Below the table, the 'Adjustment Reason Data' section is visible, showing 'Benefit area: State of Arkansas-US' and 'Adjustment reason: Cancellation'. A dropdown menu is open, displaying a list of adjustment reasons: Cancellation, Deceased Dependent, Divorce, Family Status Change, HIPAA, New Hire Enrollment, Ineligible Dependent, Transfer(Rtr. Plans), Transfer (All Plans), and Return from LWOP. Annotations with arrows point to specific elements: '8. Click Enter' points to the Enter key on the keyboard; '6. Enter the date*' points to the 'Start' date field; and '7. Select the Adjustment reason that applies' points to the 'Adjustment reason' dropdown menu.

8. Click Enter

6. Enter the date*

7. Select the Adjustment reason that applies

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*Note: The date for Cancellation will be the 1st of the month after the end of coverage..



Adjustment Reason Cancellation

SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 43356 Name Adjustm Status Active
EE group 1 Regular State Em Personnel ar ZE01 Justice Building, 1st Floor N
EE subgroup UE Employee SSN 776-99-7878
Start 01/01/2005 to 12/31/9999

Adjustment Reason Data
Benefit area State of Arkansas-US
Adjustment reason Cancellation

Deviation from end date
Current end date: 12/31/9999
Calculated end date: 01/31/2005
Do you want to replace the current end date with the calculated end date?
Yes No Cancel

9. Click Yes



Adjustment Reason Cancellation

The screenshot shows the SAP 'Create Adjustment Reasons' screen. At the top is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains several input fields: 'Personnel No' (43356), 'EE group' (1), 'Regul' (Regulation), 'EE subgroup' (UE), 'Empl' (Employee), 'Start' (01/01/2005), 'to' (01/31/2005), 'Adjustm.' (ZE01), 'Status' (Active), and 'Justice Building, 1st Floor N'. Below these fields is a section titled 'Adjustment Reason Data' with 'Benefit area' (State of Arkansas-US) and 'Adjustment reason' (Information). A dialog box titled 'Save your entries' is open in the foreground, with 'OK' and 'Help' buttons. An arrow points from the text '10. Click to Save' to the 'Save' icon in the toolbar.

10. Click to Save

Save your entries

OK Help



Adjustment Reason Cancellation

SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 43356 Name Adjustm... Status Active

EE group 1 Regular State Em... Personnel ar ZE01 Justice Building, 1st Floor N

EE subgroup UE Employee SSN 778-99-7878

Start 01/01/2005 to 01/31/2005

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason Cancellation

Go to enrollment

Do you want to go to enrollment?

Yes

No

Cancel

11. Click 'Yes' to continue to Enrollment/HRBEN0001



Adjustment Reason Cancellation

SAP

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no. 43356

ID number

Select

Enroll Name Adjustment Reason on 01/01/2005 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Cancellation	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Pers.No. Name

43356	Adjustment Reason
-------	-------------------

12. Select the 'Cancellation' offer



Adjustment Reason Cancellation

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no. 43356

ID number

Select

Pers.No. Name

43356 Adjustment Reason

Enroll

Name Adjustment Reason on 01/01/2005 Overview

Offer selection

Get offer Print form Error list

Possible offers

Possible offers	Enrollment period
	01/01/2005 - 01/31/2005
	01/01/1800 - 12/31/9999

13. Select the employee's Medical offer

Undo selection Error list

	Status	Validity period	Activity
Medical			
Health Advantage HMO		01/01/2005 - 12/31/9999	
QualChoice HMO		01/01/2005 - 12/31/9999	
Nova Sys HMO		01/01/2005 - 12/31/9999	
Health Advantage POS		01/01/2005 - 12/31/9999	
QualChoice POS		01/01/2005 - 12/31/9999	
NovaSys POS		01/01/2005 - 12/31/9999	
Blue Cross Blue Shield PPO		01/01/2005 - 12/31/9999	
NovaSys PPO		01/01/2005 - 12/31/9999	
High Deductible PPO		01/01/2005 - 12/31/9999	
Basic Life			
US Able (Basic EE Life ASE)		01/01/2005 - 12/31/9999	
Dependent Life			
US Able (Basic DEP Life ASE)		01/01/2005 - 12/31/9999	
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		01/01/2005 - 12/31/9999	
Dependent Care			



Adjustment Reason Cancellation

Enrollment

Direct selection Selection set Enroll Reason on 01/01/2005 Overview

Maintain Health Plan

Pers.No. 43356 Adjustme
Plan Health Advantage
Stop participation in period

Option Dependents

Plan options
Health Plan Opt Standard HMO ASE1
Dependent Cover Employee Only 1

Costs USD Monthly
EE pre-tax 94.52
Employer 0.00

Accept

14. Place a check in the 'Stop participation in period' box

15. Click Accept

Status	Validity period	Activity
HMO	01/01/2005 - 12/31/9999	
OS	01/01/2005 - 12/31/9999	
Field PPO	01/01/2005 - 12/31/9999	
O	01/01/2005 - 12/31/9999	
Life ASE)	01/01/2005 - 12/31/9999	
Dependent Life	01/01/2005 - 12/31/9999	
US Able (Basic DEP Life ASE)	01/01/2005 - 12/31/9999	
Opt. Dep. Life	01/01/2005 - 12/31/9999	
US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999	
Dependent Care	01/01/2005 - 12/31/9999	

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Adjustment Reason
Cancellation

The screenshot displays the 'Enrollment' application window. At the top, there is a menu bar with options: Enrollment, Edit, Goto, System, and Help. Below the menu is a toolbar with various icons. The main window is titled 'Enrollment' and contains several sections:

- Direct selection / Selection set:** Includes fields for 'Personnel no.' (43356) and 'ID number'.
- Enroll:** A section with 'Name', 'Adjustment Reason', and a date field set to '01/01/2005'. There is an 'Overview' button.
- Offer selection:** A table showing 'Possible offers' and 'Cancellation' with corresponding 'Enrollment period' dates.

Possible offers	Enrollment period
Cancellation	01/01/2005 - 01/31/2005
	01/01/1800 - 12/31/9999
- Costs:** A section with 'Undo selection' and 'Error list' buttons.
- Warning Message:** A prominent message box states: 'Note: Warning message regarding COBRA'. Below it, a smaller message box says: 'I-ZP-999 WARNING! This is a cancellation of coverage. This employee will not be offered COBRA'. There are checkmark and question mark icons at the bottom of this message box.
- Table:** A table with columns 'Status', 'Validity period', and 'Activity'. It lists various insurance plans and their validity periods.

Status	Validity period	Activity
●	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
●	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
	01/01/2005 - 12/31/9999	
- Plan Details:** A list of insurance plans including 'NovaSys PPO', 'High Deductible PPO', 'Basic Life', 'US Able (Basic EE Life ASE)', 'Dependent Life', 'US Able (Basic DEP Life ASE)', 'Opt Dep. Life', 'US Able (Opt DEP Life ASE)', and 'Dependent Care'.

An arrow points from the 'Note: Warning message regarding COBRA' box to the 'I-ZP-999 WARNING!' message box. Another arrow points from the '16. Click to continue' text to the checkmark icon in the warning message box.



Adjustment Reason Cancellation

Enrollment

Enroll Name Adjustment Reason on 01/01/2005 Overview

Offer selection

Possible offers	Enrollment period
Cancellation	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Cancellation

Enroll Costs Undo selection Error list

Medical	Status	Validity period	Activity
Health Advantage HMO		01/01/2005 - 12/31/9999	
QualChoice HMO		01/01/2005 - 12/31/9999	
Nova Sys HMO		01/01/2005 - 12/31/9999	
Health Advantage POS		01/01/2005 - 12/31/9999	
QualChoice POS		01/01/2005 - 12/31/9999	
NovaSys POS		01/01/2005 - 12/31/9999	
Blue Cross Blue Shield PPO		01/01/2005 - 12/31/9999	
NovaSys PPO		01/01/2005 - 12/31/9999	
High Deductible PPO		01/01/2005 - 12/31/9999	
Basic Life			
US Able (Basic EE Life ASE)		01/01/2005 - 12/31/9999	
Dependent Life			
US Able (Basic DEP Life ASE)		01/01/2005 - 12/31/9999	
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		01/01/2005 - 12/31/9999	
Dependent Care			

17. Click 'Enroll' to complete the Cancellation process

Note: Once the employee's Benefits have been cancelled, a Stop sign will appear.



Adjustment Reason Cancellation

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll

Name Adjustment Reason on 01/01/2005 Overview

Personnel no. 43356

ID number

Confirmation of Selected Actions

Activity	Plan	From	To
Delete	Health Advantage HMO	01/01/2005	12/31/9999
Delete	US Able (Basic EE Life ASE)	01/01/2005	12/31/9999

Pers. No. N: 43356

Note: Verify 'List of Plans' being cancelled.

Enroll Cancel

18. Click Enroll

US Able (Basic DEP Life ASE) 01/01/2005 - 12/31/9999

Opt Dep. Life 01/01/2005 - 12/31/9999

US Able (Opt DEP Life ASE) 01/01/2005 - 12/31/9999

Dependent Care 01/01/2005 - 12/31/9999

Error list

period

01/31/2005

- 12/31/9999

Error list

Validity period Activity

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

01/01/2005 - 12/31/9999

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Adjustment Reason Cancellation

Enrollment

Direct selection Selection set

Enroll Name Adjustment Reason on 01/01/2005 Overview

Personnel no. 43356

Offer selection

Print form Error list

Enrollment period

01/01/2005 - 01/31/2005
01/01/1800 - 12/31/9999

Costs Undo selection Error list

Status Validity period Activity

Health Advantage HMO	01/01/2005 - 12/31/9999	IMP
QualChoice HMO	01/01/2005 - 12/31/9999	
Health Sys HMO	01/01/2005 - 12/31/9999	
Health Advantage POS	01/01/2005 - 12/31/9999	
Choice POS	01/01/2005 - 12/31/9999	
Health Sys POS	01/01/2005 - 12/31/9999	
Cross Blue Shield PPO	01/01/2005 - 12/31/9999	
Health Sys PPO	01/01/2005 - 12/31/9999	
Deductible PPO	01/01/2005 - 12/31/9999	
Life (Basic EE Life ASE)	01/01/2005 - 12/31/9999	IMP
Life (Basic DEP Life ASE)	01/01/2005 - 12/31/9999	
Opt Dep. Life	01/01/2005 - 12/31/9999	
US Able (Opt DEP Life ASE)	01/01/2005 - 12/31/9999	
Dependent Care		

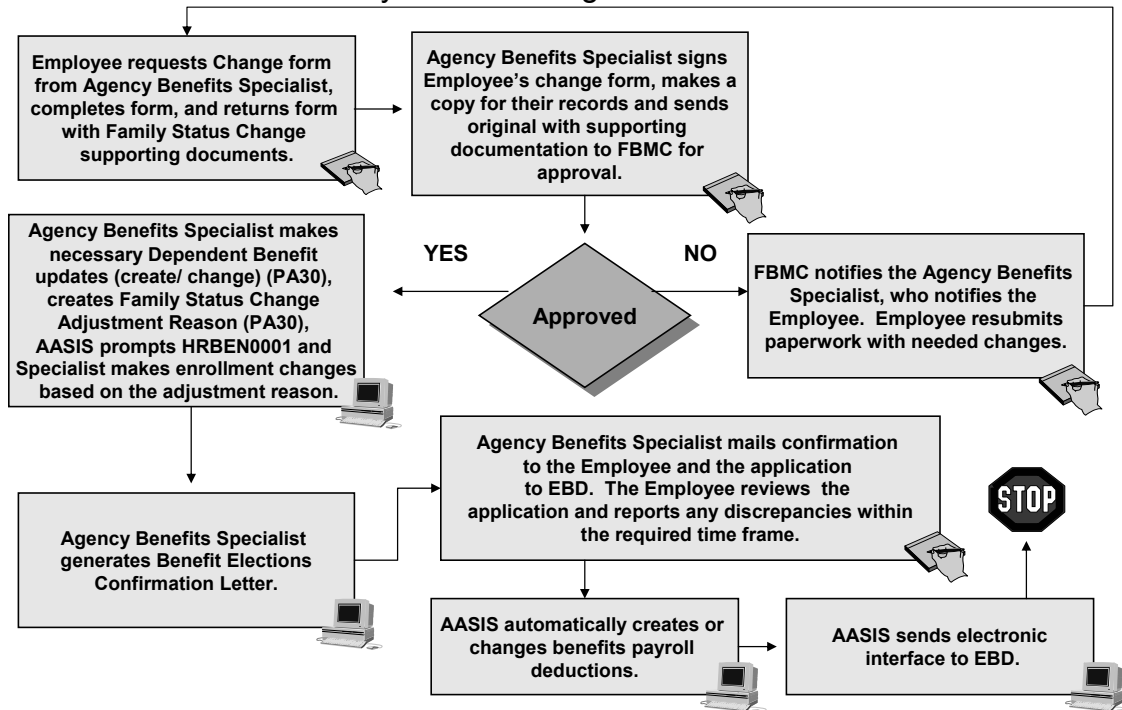
Enrollment completed successfully

Continue Confirmation

19. Click to print Confirmation letter; once completed, click Continue



Family Status Change Task Flow



Exercise

Scenario #7

- An employee has provided you with the appropriate paperwork to add their 1st child to their Health Plan. Once approved, enroll the Employee's 1st child in the requested Health Plan.





Demonstration

- **Adjustment Reason:**
(Family Status Changes)

Human Resources > Personnel Management
> Administration > HR Master Data > Maintain
(PA30)

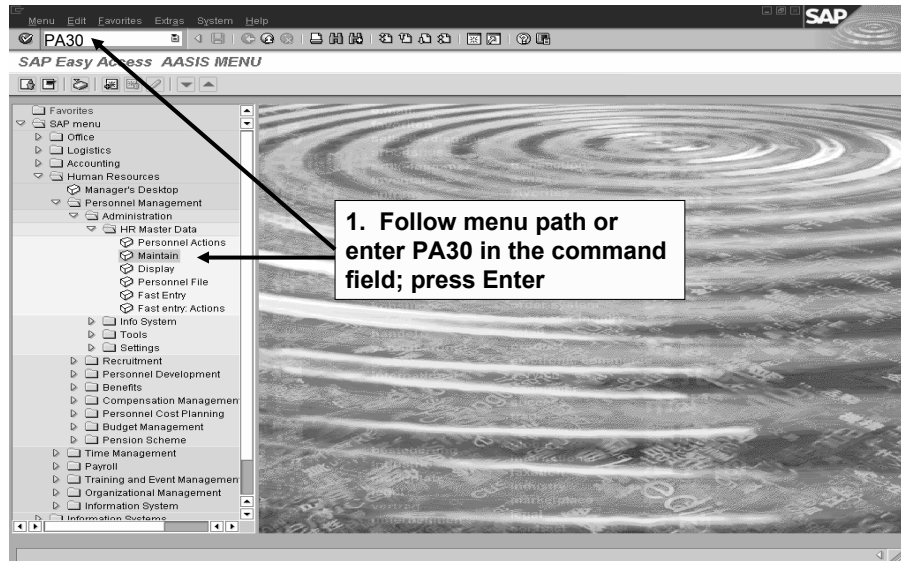


Note: Consult EBD for rules regarding documentation and approval of Family Status Changes.



Adjustment Reason

Family Status Change



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Menu Path: Human Resources>Personnel Management>Administration>HR Master Data>Maintain(PA30)

PA30-Maintain Master Data is used to update dependent records and create the Family Status Change Adjustment Reason.



Adjustment Reason

Family Status Change

The screenshot shows the SAP HR Master Data maintenance interface. At the top, the title bar reads 'HR master data' and the menu bar includes 'Edit', 'Data', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The main window title is 'Maintain HR Master Data'. Below this, a data entry section contains fields for 'Personnel no.' (98), 'Name' (Diana Edwards), 'EE group' (1 Regular State), 'Pers. area' (FA04 DFA), 'EE subgroup' (UE Employee), and 'Cost Center' (393230 ZOO). A tabbed interface at the bottom includes 'Benefits', 'Payroll', 'Taxes', 'Overseas', and 'Time'. The 'Benefits' tab is active, showing a list of infotypes on the left and a 'Period' selection area on the right. The 'Family Member/Dependents' infotype is selected in the list. Three numbered callouts are present: 1. 'Enter Personnel Number' points to the 'Personnel no.' field. 2. 'Select the Benefits tab' points to the 'Benefits' tab. 3. 'Select Family Member/Dependents Infotype' points to the 'Family Member/Dependents' entry in the infotype list.

1. Enter Personnel Number

2. Select the Benefits tab

3. Select Family Member/Dependents Infotype

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The Family Member/Dependents Infotype can be accessed using the Benefits tab or the Personal Data tab.

To access the Benefits tab, use left and right scroll buttons to locate.



Adjustment Reason

Family Status Change

The screenshot shows the SAP HR Master Data maintenance interface. At the top, the title bar reads 'HR master data' and the menu bar includes 'Edit', 'Data', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The main window title is 'Maintain HR Master Data'. Below this, a toolbar contains several icons, including a 'Create' icon (a document with a plus sign). A callout box with the text '4. Click to Create' points to this icon. The main area displays employee data for Diana Edwards (Personnel no. 96). The data includes Name, ID group (1 Regular State), Pers. area (FA04 DFA), Cost Center (383230), and Employee (ZOO). On the left, a list of data categories is shown, with 'Family Member/Dependents' selected. On the right, a 'Period' selection dialog is open, showing options for 'From' and 'To' dates, with 'Today' selected for both. A 'Choose' button is at the bottom of the dialog.

Field	Value
Personnel no.	96
Name	Diana Edwards
ID group	1 Regular State
Pers. area	FA04 DFA
Cost Center	383230
Employee	ZOO

4. Click to Create

Period

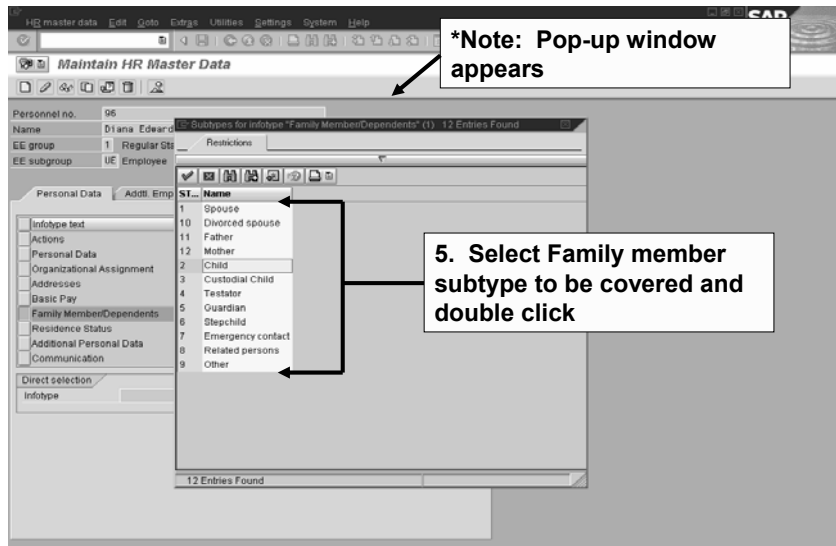
From: Today To: Today

Choose



Adjustment Reason

Family Status Change





Adjustment Reason

Family Status Change

Personnel No. 96 Name Diana E. Status Active
EE group 1 Regular State Em. Perso
EE subgroup UE Employee SSN
Start 05/20/2004
Member Child
Personal data
Last name Edwards
First name Kennedy Initials A
Title
Gender ☒ Female ☐ Male
Birth date 05/20/2004 Ref. pers. no.
SSN 006-08-1912 Telephone number 501 555-1912
Street 1 Katielee Lane Separation Date
City/State Little Rock AR Marital status 1 Marr.
Zip/country 72223 US
Physician
Physician1
ID Number
Physician2
ID Number
Challenge
☐ Disability
Disability Date
Learned
Status
☐ Student Indicator
☐ Medicare
☐ Smoker
☐ Military Service
☐ Fin. Indep.

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*For newborns, enter the DOB for the Start field and for the Birth Date field.

For other dependents that are to be added, enter the effective date of coverage.

The Name, DOB, and SSN are all required fields, the Physician information is also required for all HMO and POS Plans.

Note: For newborns, use a temporary SSN until permanent one is issued per EBD's instructions.

(Newborn default SSN: 888-(last 6 digits of the employee's SSN)

Twins: 888-88-(last 4 digits of the employee's SSN)



Adjustment Reason

Family Status Change

8. Click to continue

Change Family Member/Dependents

Personnel: Status: Active
EE group: DFA
EE subgroup: UE Employee SSN: 012-66-0863
Start: 05/20/2004 To: 12/31/9999 Chng: 06/02/2004 TRAIN-HR010
Member: Child

Personal data

Last name: Edwards
First name: Kennedy
Title:
Gender: ☒ Female ☐ Male
Birth date: 05/20/2004 Ref pers no.:
SSN: 006-08-1912 Telephone number: 501 555-1912
Street: 1 Katielene Lane
City: Little Rock AR Marital status: 1 Marr.
State: AR
Zip/country: 72223 US (USA)

Physician

Physician1:
ID Number:
Physician2:
ID Number:

Challenge

☐ Disability
Disability Date:
Learned:

Status

☐ Student Indicator
☐ Medicare
☐ Smoker
☐ Military Service
☐ Fin. Indep.



Adjustment Reason

Family Status Change

9. Click to Save

Change Family Member/Dependents

Personnel No. 96 Name Diana E. Status Active
EE group 1 Regular State Em... Personnel ar FA04 DFA
EE subgroup UE Employee SSN 012-66-0863
Start 05/29/2004 To 12/31/9999 Chngi 06/02/2004 TRAI:NR010

Member Child

Personal data
Last name Edwards
First name Kennedy Initials A
Title
Gender ☒ Female ☐ Male
Birth date 05/29/2004 Ref pers no.
SSN 096-00-1912 Telephone number 501 555-1912
Street 1 Kabelee Lane Separation Date
City/State Little Rock AR Arkansas
Zip/country 72223 US USA

Physician
Physician1
ID Number
Physician2
ID Number

Challenge
☐ Disability
Disability Date
Learned

Status
☐ Student Indicator
☐ Medicare
☐ Smoker
☐ Military Service
☐ Fin. Indep.



Adjustment Reason

Family Status Change

The screenshot shows the SAP 'Maintain HR Master Data' interface. The 'Personal Data' tab is active. On the left, a list of infotypes is shown with checkboxes. 'Family Member/Dependents' is selected and highlighted. On the right, the 'Period' section shows options for 'Today', 'A11', 'From curr date', 'To current date', 'Curr period', 'Curr week', 'Current month', 'Last week', 'Last month', and 'Current Year'. The 'Direct selection' section at the bottom shows 'Infotype' as 'Family Member/Dependents' and 'STy' as 'STy'. A status bar at the bottom indicates 'Record created'.

***Note: Record has been created**



Adjustment Reason

Family Status Change

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 96
Name Diana Edwards
EE group 1 Regular State ... Pers. area FA04 DFA
EE subgroup 01 Employee Cost Center 369236 Z00

10. Select Benefits tab

Benefits Payroll Taxes Garnishments Time

11. Select Adjustment Reason Infotype

Infotype text E
General Benefits Information ☒
Family Member/Dependents ☒
Adjustment Reasons ☒
Health Plans ☒
Insurance Plans ☒
Savings Plans ☒
Flexible Spending Accounts ☒
Benefits Medical Information ☒
COBRA-Qualified Beneficiary ☒

Period
Period
Fr. To
☐ Today ☐ Curr.week
☐ All ☐ Current month
☐ From curr.date ☐ Last week
☐ To current date ☐ Last month
☐ Curr.period ☐ Current Year
Choose

Direct selection
Infotype STy



Adjustment Reason

Family Status Change

The screenshot shows the SAP HR Master Data maintenance interface. At the top, the menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title bar reads 'Maintain HR Master Data'. The personnel number is '96' and the name is 'Diana Edwards'. The address field shows 'FA84 DFA' and '383230 ZOO'. The left-hand list contains the following items: 'Infotype text', 'General Benefits Information', 'Family Member/Dependents', 'Adjustment Reasons', 'Health Plans', 'Insurance Plans', 'Savings Plans', 'Flexible Spending Accounts', 'Benefits Medical Information', and 'COBRA-Qualified Beneficiary'. The 'Adjustment Reasons' item is highlighted with a callout box that says '12. Click to create'. The right-hand pane shows the 'Period' selection options: 'Period', 'Fr.', 'To', 'Today', 'Curr.week', 'All', 'Current month', 'From curr.date', 'Last week', 'To current date', 'Last month', 'Curr.period', and 'Current Year'. The 'Choose' button is visible at the bottom of the right-hand pane.



Adjustment Reason

Family Status Change

13. Enter *effective date of coverage change

14. Click on the icon and choose Family Status Change

Adjustment Reason Data	
Benefit area	State of Arkansas-US
Adjustment reason	Family Status Change

Choose a valid function

For Health and Life coverage, consult EBD procedures and Tables of Important Dates. The effective date of coverage will always be on the first of the month, except for newborns.

*The effective date of coverage change is always the 1st of the month after the date of application, except for newborns which will be the date of birth.



Adjustment Reason

Family Status Change

SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No. 96 Name D1ana E... Status Active

State Em... Personnel ar FA04 DFA

SSN 012-66-0863

to 12/31/9999

Adjustment Reason Data

Benefit area	State of Arkansas-US
Adjustment reason	Family Status Change

15. Click to enter



Adjustment Reason

Family Status Change

The screenshot shows the SAP 'Create Adjustment Reasons' window. The main window has a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. Below the menu bar, the title 'Create Adjustment Reasons' is displayed. The main area contains a form with the following fields:

Personnel No	96	Name	Diana E	Status	Active
EE group	1	Regular State Em...	Personnel ar	FA04	DFA
EE subgroup	UE	Employee	SSN	012-66-0863	
Start	06/01/2004	to	12/31/9999		

Below the form, the 'Adjustment Reason Data' section is visible, showing 'Benefit area' as 'State of Arkansas-US' and 'Adjustment reason' as 'Family Status Change'.

A pop-up window titled 'Deviation from end date' is overlaid on the main window. It contains the following text:

Current end date: 12/31/9999
Calculated end date: 07/01/2004

Do you want to replace the current end date with the calculated end date?

At the bottom of the pop-up are three buttons: 'Yes', 'No', and 'Cancel'.

A callout box with the text '*Note: Pop-up window will appear' points to the pop-up window. Another callout box with the text '16. Click on Yes' points to the 'Yes' button.

Click Yes to replace the current end date with the new date, 30 days after the effective date of change of coverage.



Adjustment Reason

Family Status Change

The screenshot shows the SAP 'Create Adjustment Reasons' interface. At the top is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons, including a save icon (a floppy disk). A callout box with the text '17. Click to save' has an arrow pointing to this save icon. The main area of the screen contains a form with the following fields:

Personnel No	96	Name	[Blank]		Status	Active
EE group	1	Regular State Em...	Personnel ar	FA04	DFA	
EE subgroup	UE	Employee	SSN	012-66-0863		
Start	06/01/2004	to	07/01/2004			

Below this is a section titled 'Adjustment Reason Data' with two rows:

Benefit area	State of Arkansas-US
Adjustment reason	Family Status Change

At the bottom left of the window is a button labeled 'Save your entries'.



Adjustment Reason

Family Status Change

The screenshot shows the SAP 'Create Adjustment Reasons' window. The main window has a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. Below the menu bar, there are input fields for Personnel No (96), Name (Diana E.), Status (Active), EE group (1), Regular State Em..., Personnel ar (FA04), DFA, EE subgroup (UE), Employee, SSN (012-66-0863), and Start (06/01/2004 to 07/01/2004). The 'Adjustment Reason Data' section shows Benefit area (State of Arkansas-U) and Adjustment reason (Family Status Chan). A pop-up dialog box titled 'Go to enrollment' is displayed in the foreground, asking 'Do you want to go to enrollment?' with buttons for Yes, No, and Cancel. A callout box with the text '*Note: Pop-up window appears' points to the dialog box. Another callout box with the text '18. Click "Yes"' points to the 'Yes' button in the dialog box.

Personnel No	Name	Status	Active
96	Diana E.	Active	

EE group	Regular State Em...	Personnel ar	DFA
1		FA04	

EE subgroup	Employee	SSN
UE		012-66-0863

Start	to
06/01/2004	07/01/2004

Adjustment Reason Data
Benefit area
Adjustment reason

Benefit area	Adjustment reason
State of Arkansas-U	Family Status Chan

*Note: Pop-up window appears

18. Click "Yes"

Click 'Yes' to go to Enrollment



Adjustment Reason

Family Status Change

The screenshot shows the SAP HRBEN enrollment interface. On the left, there are input fields for 'Personnel no.' and 'ID number', and a 'Select' button. Below these is a list of personnel with columns 'Pers.No.' and 'Name'. The list includes: 20 Susan Vollman, 55 Gail Hadley, 96 Diana Edwards, 169 Charles Carruth, and 1109 Kennedi Edwards. On the right, the 'Enroll' section shows 'Name: Diana Edwards' and 'on: 11/21/2004'. Below this is the 'Offer selection' table:

Possible offers	Enrollment period
Family Status Change	11/21/2004 - 12/21/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

A callout box with the text '19. Double-click on Family Status Change' has an arrow pointing to the 'Family Status Change' row in the table.



Adjustment Reason

Family Status Change

20. Select Benefit plan to be modified

The screenshot shows the SAP Enrollment system interface. The 'Enroll' tab is selected, and the 'Family Status Change' adjustment reason is chosen. The 'Offer selection' table lists the following offers:

Possible offers	Enrollment period
Family Status Change	10/04/2004 - 11/03/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

The 'Family Status Change' section is expanded, showing a list of benefit plans. The 'Medical' section is highlighted, and a callout box points to it. The list of plans includes:

- Health Advantage HMO
- QualChoice HMO
- Health Advantage POS
- QualChoice POS
- Blue Cross Blue Shield PPO
- Nova Sys HMO
- NovaSys POS
- NovaSys PPO
- High Deductible PPO
- Basic Life
- US Able (Basic EE Life ASE)
- Dependent Life
- US Able (Basic DEP Life ASE)
- Opt. Dep. Life
- US Able (Opt DEP Life ASE)
- Optional Life

Select the Benefits Plan to be modified.

Plans enrolled in show a green radio button next to the name.
Double click on the name of the desired plan.

21. Select the Dependents tab

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Adjustment Reason

Family Status Change

22. Select the box to add the new dependent

23. Select the Option tab

Enrollment

Direct selection Selection set Enroll

Maintain Health Plan

Pers.No. 96 Diana Edwards

Plan Health Advantage HMO

Start 10/04/2004 - 12/31/2004

Stop suspension in period

Option Dependents

Select	Name	Type of dep./ben.
<input checked="" type="checkbox"/>	Kayla Edwards	Child

Accept

Undo selection

Status	Validity period	Activity
MO	10/04/2004 - 12/31/9999	
OS	10/04/2004 - 12/31/9999	
Field PPO	10/04/2004 - 12/31/9999	
O	10/04/2004 - 12/31/9999	
Life ASE)	10/04/2004 - 12/31/9999	
Dependent Life	10/04/2004 - 12/31/9999	
US Able (Basic DEP Life ASE)	10/04/2004 - 12/31/9999	
Opt. Dep. Life	10/04/2004 - 12/31/9999	
US Able (Opt DEP Life ASE)	10/04/2004 - 12/31/9999	
Optional Life	10/04/2004 - 12/31/9999	

Adjustment Reason

Family Status Change

24. Change Coverage to Employee+Children 1

25. Click to Accept

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Adjustment Reason

Family Status Change

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name

96 Diana Edwards

Enroll

Name Diana Edwards on 11/03/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Family Status Change	10/04/2004 - 11/03/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Family Status Change

Enroll Costs Undo selection Error list

	Status	Validity period	Activity
Medical			
Health Advantage HMO		10/04/2004 - 12/31/9999	✓
QualChoice HMO		10/04/2004 - 12/31/9999	
Health Advantage POS		10/04/2004 - 12/31/9999	
QualChoice POS		10/04/2004 - 12/31/9999	
Blue Cross Blue Shield PPO		10/04/2004 - 12/31/9999	
Nova Sys HMO		11/21/2004 - 12/31/9999	
NovaSys POS		11/21/2004 - 12/31/9999	
NovaSys PPO		11/21/2004 - 12/31/9999	
High Deductible PPO		11/21/2004 - 12/31/9999	
Basic Life			
US Able (Basic EE Life ASE)		10/04/2004 - 12/31/9999	
Dependent Life			
US Able (Basic DEP Life ASE)		10/04/2004 - 12/31/9999	
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		10/04/2004 - 12/31/9999	
Optional Life			

26. Click to Enroll



Adjustment Reason

Family Status Change

Enrollment

Direct selection Selection set

Enroll Name Diana Edwards on 06/02/2004 Overview

Personnel no.

ID number

Confirmation of Selected Actions

Activity	Plan	From	To
Change	Health Advantage HMO	06/01/2004	12/31/9999

Enroll Cancel

27. Click to enroll



Adjustment Reason

Family Status Change

The screenshot shows the SAP Enrollment interface. A message box in the foreground states: "Enrollment completed successfully". Below this message are two buttons: "Continue" and "Confirmation". An arrow points from the "Confirmation" button to a text box. The background shows the enrollment details for Diana Edwards, including the enrollment period (06/01/2004 - 12/31/9999) and a list of selected benefits.

Benefit	Status	Validity period	Activity
Health Advantage HMO	✓	06/01/2004 - 12/31/9999	
QualChoice HMO		06/01/2004 - 12/31/9999	
Health Advantage POS		06/01/2004 - 12/31/9999	
QualChoice POS		06/01/2004 - 12/31/9999	
Blue Cross Blue Shield PPO		06/01/2004 - 12/31/9999	

Confirmation of Enrollment is required to supply the employee with verification of Benefits selected. Click Confirmation and follow print instructions. Once printing is complete, select Continue to complete.



Questions and Answers

